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ABSTRACT

In an attempt to break down interinstitutional isolation, a group of biomedical librarians developed an interlibrary loan agreement with the specific goal of promoting better access to biomedical information for health care workers in the Metropolitan Detroit area. This is a report on the development of that agreement, which includes the eight-part agreement of the "Interlibrary Loan Agreement Among Biomedical Libraries of Metropolitan Detroit." This agreement records on paper what has developed through years of cooperation and provides a mechanism for group action. (MF)

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PAPER AND REPORTS, NO. 7

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**PAPERS AND REPORTS, NO. 7**

# THE DEVELOPMENT OF AN INTERLIBRARY LOAN AGREEMENT AMONG BIOMEDICAL LIBRARIES OF METROPOLITAN DETROIT

BY

JOAN M. B. SMITH

LT 002 184

Supported in part by USPHS Grant LM 00628-02

Detroit
August 1970

# Preface

Our society is becoming increasingly complex and interdependent. The means for relating, to use a current term, to individuals are altered. Those of us who must work within institutions to carry out our work find ourselves increasingly alienated from our peers. Our institutions are seeking new values and goals which conflict with professional objectives and functions. Problems which formerly could be dealt with on a person-to-person basis in a tradition of goodwill and trust can no longer be dealt with in this manner. Complexity breeds rules, regulations, and procedures. Without organization, problems remain unsolved and feelings of goodwill are replaced with indifference.

Miss Smith's report on the development of an interlibrary loan agreement is a commendable effort by a group of biomedical librarians to identify new interinstitutional relationships. It is an effort to break down institutional isolation. At the same time, the agreement establishes new sets of rules with its inevitable bureaucratic constraints. The effort to create a mechanism to make self-evaluations and recommendations for action as the bureaucracy grows is unusual compared to other interlibrary cooperative efforts that have been tried. Because this action by the Metropolitan Detroit Medical Library Group is supportive of the Kentucky, Ohio, Michigan Regional Medical Library's objectives, we have prevailed upon Miss Smith to allow us to distribute her report to other biomedical library groups in the region for their comment and judgment.

V. M. Pings
Director, KOMRML

The Metropolitan Detroit Medical Library Group, hereinafter referred to as MDMLG, has a long history of co-operative projects undertaken to improve the service which member libraries could offer to their patrons.[1] The most important and the oldest co-operative effort is interlibrary loan. Since the Medical Library of Wayne State University is the only academic medical collection in the metropolitan area, it is natural that hospital libraries and other smaller biomedical collections have always borrowed extensively from each other as well as from the major resource library.

Wayne Medical Library's interlibrary loan program has been supported in recent years by federal funds under the Medical Library Assistance Act. While the number of interlibrary loans processed by Wayne Medical Library increased by as much as 20 per cent per year, the federal funds available to support the program diminished annually. By 1970 it was necessary for Wayne Medical Library to find a new method of recovering the cost of the interlibrary loan program. This problem could be attacked in various ways:

1. A membership fee could be charged in institutions that participate in the interlibrary loan program.
2. Certain kinds of material, e.g. commonly held journal titles, could be declared ineligible for lending by the resource library.
3. Each borrowing institution could be assigned a quota of loans to be supplied free. A charge would be made for each transaction over the quota.

Whichever method might be adopted (and in Detroit it was the third one) necessitated that the member libraries of MDMLG become increasingly dependent on each other.

The occasional meetings of MDMLG provided a forum where the changing interlibrary loan situation could be discussed. Interlibrary loan, as conducted by the biomedical libraries of Metropolitan Detroit, was based on a spirit of co-operation and generally followed the principles of the existing ALA Interlibrary Loan Code. In the increasingly complex interlibrary loan situation of mid-1969, there seemed to be need for a formal written agreement that would outline exactly how interlibrary loan was carried on and would provide both a means of monitoring the operation and a method of imposing sanctions against institutions that did not abide by the agreement. At a meeting of MDMLG on September 24, 1969, the membership agreed that interlibrary loan was essential to the functioning of their libraries and that a formal agreement should be devised and presented to the membership for their approval. The Model Interlibrary Loan Code that had appeared in the ALA Bulletin of April 1969 was accepted as a starting point. The completed agreement would be sent to each member institution to be signed by the librarian and a member of the administration of the institution.

A committee of six was selected to adapt the ALA Model Code. Members of the Committee were chosen to give representation to libraries with different interlibrary loan functions: larger hospital collections that lent more items than they borrowed; smaller libraries that were primarily borrowers; and the academic medical library.*

* Members of the Committee were: Clara Cziski, Sinai Hospital of Detroit, Barbara Fenn, Mt. Carmel Mercy Hospital, Barbara Coe Johnson, Harper Hospital, Joyce Malin, Henry Ford Hospital, Jean Monroe, Wayne Medical Library, Joan Smith, Children's Hospital of Michigan.

Clause by clause examination of the Code by the Committee was accomplished in two two-hour sessions. Editorial changes were made; wording was modified and provisions were regrouped for the sake of clarity and brevity. Parts of the code which were more relevant to a public library group than a medical library group were omitted. Appendixes that described the correct method of completing ALA request forms for books and journals were added.

The most significant change was the incorporation of a section which provided for the establishment of an Evaluation Committee (1) to collect data from the members regarding their interlibrary loan operations and (2) to perform a continuing analysis of the effectiveness of the agreement and amend the agreement when found necessary. The Evaluation Committee was assigned the responsibility of calling an annual meeting of the signers of the Agreement at which additions or changes to the Agreement would be presented to the membership for their consideration. To this Committee also would fall the doleful duty of determining that an institution had so continually disregarded the provisions of the Agreement that its borrowing privileges should be suspended.

When the first draft of the Agreement was completed, a copy was sent to each institutional member of MDMLG so that the librarians could study it before a meeting to be held on December 2. A detailed discussion of each section of the Agreement took place at the meeting. A number of changes in wording were made. The function and method of operation of the Evaluation Committee was discussed at length. Following the meeting, a second draft of the Agreement was prepared incorpo-

rating changes resulting from the discussion. The new draft was sent to the membership for review before the next meeting which was scheduled for February 25, 1970. In the meantime, the librarians were to discuss the Agreement with their administrators to learn if they regarded it favorably and would sign it.

At the February 25 meeting discussion once again centered on the Evaluation Committee section. A clause was added to the Agreement stating that official minutes should be taken of the actions and decisions of the Evaluation Committee and of the Annual Meeting of the signers of the Agreement. The minutes would be permanently retained at Wayne Medical Library.

Doubt was expressed that the Agreement was specific enough. Eventually it was agreed that an agreement that was too specific might hamstring the entire interlibrary loan process. The purpose of the Agreement was to put on paper what had developed through years of co-operation and to provide a mechanism for Group Action.*

The final draft of the Agreement was prepared and forwarded to 85 libraries together with a covering letter indicating acceptance of the Agreement. The letter was to be signed by the librarian and an administrative officer of the institution and returned to the Secretary of MDMLG before the April 15 meeting of the Group. By April 15, letters of acceptance were received from 44 libraries; by July, ten more letters had been received. After the business meeting of MDMLG, librarians from

* Even before the Agreement was adopted the members acted collectively to request one member hospital to reconsider a decision to require that payment for each interlibrary loan transaction should accompany the request. This necessitates the issuing of many small checks, an unpopular procedure with hospital accounting departments. A letter from the Chairman of MDMLG to the librarian of the hospital concerning the method of payment resulted in a decision to bill borrowing institutions quarterly.

institutions that were signers of the Agreement met to select the three members of the first Evaluation Committee.*

The first stage of the development of the Interlibrary Loan Agreement Among Biomedical Libraries of Metropolitan Detroit was now complete and the members of MDMLG who had signed the Agreement were ready to participate in a new experiment in interlibrary co-operation.

* Members of the first Evaluation Committee are: Sister Patricia, Providence Hospital, Ellen Wilhelm of St. Joseph's Hospital, Mt. Clemens and James Williams of Wayne Medical Library.

## REFERENCES


1. McNamara, M.E.: Establishing a medical library network for the Metropolitan Detroit area. Bull. Med. Libr. Ass. 55:42-7, 1967.

2. Model interlibrary loan code for regional, state, local or other special groups of libraries. Bull. Amer. Libr. Ass. 63:513-16, 1969.

# INTERLIBRARY LOAN AGREEMENT AMONG BIOMEDICAL LIBRARIES OF METROPOLITAN DETROIT

This is a voluntary agreement adopted by those members of the Metropolitan Detroit Medical Library Group who engage in interlibrary loan for the purpose of promoting better access to biomedical information for health care workers in this area.

## I. Definition

1. Interlibrary loans are transactions in which library materials are made available by one institution, hereinafter referred to as library, to another; for the purposes of this agreement they also include the provision of copies as substitutes for loans of the original materials.

## II. Purpose

1. Since it is impossible for any one library to be self-sufficient, interlibrary borrowing and lending is regarded by the institutions subscribing to this agreement as essential to library service.

## III. Responsibility of Lending Libraries

1. Lending libraries will practice as liberal and unrestrictive a policy as possible in interlibrary loan with due consideration to the interests of their primary clientele.

2. Lending libraries have the responsibility of informing borrowing libraries of any failure to observe the provisions of this agreement and, if necessary, may invoke the provisions stated in Section VIII.

3. Each library entering into this agreement shall regard itself as a lender.

4. Lending libraries will collect and maintain data concerning their interlibrary lending operations and will submit these data to the Evaluation Committee (see Section VII) as requested.

## IV. Responsibility of Borrowing Libraries

1. Each library will provide the resources necessary to support the purposes of its parent institution (e.g. patient care, research) and will not assume that interlibrary lending relieves it of the responsibility of developing its own collection. No library should depend upon another to supply the normal needs of its clientele.

2. Borrowing libraries are expected to check their own holdings before requesting any item on interlibrary loan.

3. Borrowing libraries will screen users' requests to determine that they are pertinent to the parent institution's purposes and will reject those that are not.

V. Material appropriate for Interlibrary Loans

1. Under the terms of this agreement it is permissible to request on interlibrary loan any material appropriate to the purposes of the parent institution that is not immediately available from the library's own collection.

2. Under the terms of this agreement, borrowing libraries will not ordinarily request:

   a. Books and journals in current or recurring demand, or both;

   b. Bulky or fragile materials;

   c. Rare materials in the original;

   d. Photocopies of extremely long articles (e.g. supplements and symposia);

   e. Materials for class reserve and other group use;

   f. Reference material in the original;

   g. Multiple copies of one article.

3. The lending library will decide in each case whether the original or a copy should be sent.

VI. Terms of Loan

1. Expenses

   a. The borrowing library should be prepared to assume any costs charged according to the established policy of the lending library including handling, postage, insurance, and service charges.

2. Limitations

   a. The borrowing library will honor any limitations on use imposed by the lending library.

   b. Unless specifically forbidden by the lending library, it is assumed that copying is permitted, provided that it is in accordance with copyright law and provided that no damage to the original volume will result.

   c. The safety of borrowed materials is the responsibility of the borrowing library. The borrowing library will meet all costs of repair or replacement in accordance with the preferences of the lending library.

3. Placement of Requests

   a. Resources of institutions of similar purposes should be exhausted by the borrowing library before it applies to a larger resource library.

   b. Every effort will be made to locate materials through union lists and catalogues.

   c. Requests may be transmitted by mail, messenger or teletype, using all elements of the ALA form. When mutually agreeable, telephone requests are acceptable and shall be confirmed by the mailing of a standard form unless the lending library waives this record.

   d. No library will lend directly to an individual on an interlibrary loan basis except by mutual agreement between the borrowing and the lending library.

4. Form of Request

   a. Material requested must be described as completely and accurately as possible following accepted bibliographic practice.

   b. All items shall be verified in standard bibliographic tools and shall be cited as shown in the examples included in Appendixes A and B. When the item cannot be verified, the statement "cannot verify" shall be entered and complete information as to source of reference and tools searched shall be furnished (See Appendixes A and B. No. 9).

   c. The lending library will make no special effort to identify an unverified reference and will return any such request unfilled if it proves to be incorrect.

   d. The name and status (position or other identifying information) of the individual for whom the information is being requested shall appear on the request form (Appendixes A and B, No. 4-6).

   e. All forms must carry the signature of the librarian or staff member authorized to request loans (Appendixes A and B, No. 11).

   f. All requests shall be addressed to the interlibrary loan librarian at the lending institution.

5. Disposition of Loan Material

   a. Material furnished in photocopy need not be returned to the lending library.

b. Material furnished in the original:

1) should be returned to the lending library by the due date;

2) is not ordinarily renewable. If renewal is necessary, the request will reach the lending library before the due date. If the lending library does not deny renewal, it will be assumed that the renewal period is the same as the original loan period;

3) must be returned by the borrowing library promptly and in good condition;

4) is subject to recall at any time and the borrowing library shall comply promptly.

6. Notification and Acknowledgement

a. If the material cannot be supplied, the lending library shall indicate the reason promptly to the borrowing library so that another source can be tried.

b. Except in the case of very valuable shipments, no acknowledgement of receipt is necessary. If there is undue delay in receipt of shipments, the borrowing library shall notify the lending library so that a search may be initiated.

c. If any circumstance prevents prompt return, the borrowing library is responsible for notifying the lending library on or before the due date.

VII. Evaluation and Amendment

1. To provide a means of continuous evaluation of the effectiveness of this agreement in promoting good interlibrary loan service among the biomedical libraries of the Metropolitan Detroit area and to provide a means of amending the agreement when necessary, a committee of three shall be chosen from among the signers of the agreement at an open meeting of the signers.

2. The Committee shall be called the Evaluation Committee and its members shall serve for three years with a new member elected each year. The Committee shall establish its own rules and procedures.

3. The Evaluation Committee will facilitate its continuing analysis of the effectiveness of the Agreement by periodically requesting data concerning interlibrary lending operations from libraries that are institutional signers of the agreement.

4. The Evaluation Committee shall be responsible for calling an annual meeting of the signers of the Agreement at which proposed additions or changes shall be presented to the membership to be approved or disapproved by a majority vote of the membership. The Evaluation Committee shall advise the member-

ship of the forthcoming meeting at least 30 days prior to the date of the meeting and shall include with the notification a copy of the proposed additions or amendments or both.

5. Actions and decisions of the Evaluation Committee and of the Annual Meeting shall be recorded in official minutes and permanently retained.

VIII. Violation of the Agreement

1. If the Evaluation Committee determines that there is continued disregard of the provisions of this agreement, this shall be sufficient reason for suspension of borrowing privileges.

# DIRECTIONS FOR PREPARING REQUEST FOR ARTICLE IN PERIODICAL

Appendix A

## INTERLIBRARY LOAN REQUEST

REQUEST **A**

According to the A.L.A. Interlibrary Loan Code

Date of request: (1) 1/13/67 Remarks: (2)

Borrowing Library

*Fill in left half of form; send sheets A, B and C to Lending library; and enclose shipping label*

(3)
Library
John Doe Hospital
Detroit, Michigan 48226

For use of (4) J. Smith Status (5) Intern Dept (6) Int. Med.

Author (or Periodical title, vol. and year)

*Fold* →

(7) JOURNAL OF APPLIED PHYSIOLOGY
v. 18:822, Aug. 1964

Call-No.

Title (with author and pages for periodical articles) (incl. edition, place and date)

(8) Mohammed, S. Thermal indicator sampling and injection sites for cardiac output. ☐ Any edition
pp. 742-45

Verified in (or Source of reference) (9) Index medicus. Dec. '63. S3383

If non-circulating, please send cost estimate for ☐ microfilm ☐ photoprint.

Lending Library

*Fill in pertinent items under REPORTS; return sheets B and C to Borrowing library*

(10)
LIBRARY--SCHOOL OF MEDICINE
WAYNE STATE UNIVERSITY
645 MULLETT STREET
DETROIT, MICHIGAN 48226

*NOTE: No acknowledgment of receipt or return is required. The receiving library assumes responsibility for notification of non-receipt. Stamps in payment of transportation costs should accompany sheet D: Notice of Return.*

AUTHORIZED BY: (11) R. Smith

**REPORTS:** Checked by _____

SENT BY: ☐ BOOK RATE ☐ Express Collect

☐ _____ (Other) Insured for $_____

Date sent _____ Charges $_____

DATE DUE _____ (or period of loan)

☐ For use in Library only

**NOT SENT BECAUSE:**

☐ Not owned by Library ← *Fold*

☐ Non-circulating ☐ Hold Placed

☐ In use ☐ Request again

☐ Other:

☐ Suggest you request of:

Estimated Cost of Microfilm _____

Photoprint _____

**RECORDS:** *(Borrowing library fills in)*

Date Vol. received: _____

Date Vol. returned: _____

By ☐ BOOK RATE ☐ Express Prepaid

Other: _____ Insured for $_____

**RENEWALS:** *(Request and report back on sheet C: Interim Report)*

Requested on: _____

Renewed to: _____ (or period of renewal)

1. Date request form is prepared.
2. Use for special instructions or circumstances, e.g. unavailability of item locally, last date which item would be needed.
3. Complete name and address of borrowing library <u>including zip code</u>. If more than one form is sent at one time, complete name and address <u>must</u> be included on each form.
4.-6. Identification of borrower for whom request is made.
7. Complete title of periodical, volume number and date. (Do not enter author of article in this space.)
8. Complete citation: author, title of article and inclusive pagination.
9. Complete bibliographic source of reference, i.e.: Index Medicus, Dec. '63, s-3383, or source of reference e.g. J. of App. Phys. 18:822, Aug., 1964.
10. Complete address of Wayne State University, Medical Library.
11. Signature of librarian or staff member authorized to request loans. <u>This is required</u>.

A. <u>PREPARE A SEPARATE FORM FOR EACH ITEM REQUESTED</u>.

B. <u>DETACH AND RETAIN BOTTOM SHEET OF FORM ONLY</u>.

C. <u>ALL REQUESTS MUST BE TYPED</u>.

# DIRECTIONS FOR PREPARING REQUESTS FOR MONOGRAPHIC MATERIAL

Appendix B

## INTERLIBRARY LOAN REQUEST

**REQUEST A**

According to the A.L.A. Interlibrary Loan Code

Date of request (1) 6/18/67 Remarks: (2)

Borrowing Library

*Fill in left half of form; send sheets A, B and C to Lending Library; and enclose shipping label*

(3)
Library
John Doe Hospital
Detroit, Michigan 48226

For use of (4) J. Smith Status (5) Resident Dept (6) Int. Med.

Author (or Periodical title, vol. and year)

*Fold* ➡ (7) Moore, Robert Allen

Call-No.

Title (with author and pages for periodical articles) (incl. edition, place and date)

(8) Textbook of pathology. 2d ed., 1951
Saunders, Philadelphia ☐ Any edition

Verified in (or Source of reference) (9) CBI 1949-52, page 1290

If non-circulating, please send cost estimate for ☐ microfilm ☐ photoprint.

Lending Library

*Fill in pertinent items under REPORTS; return sheets B and C to Borrowing Library*

(10)
LIBRARY--SCHOOL OF MEDICINE
WAYNE STATE UNIVERSITY
645 MULLETT STREET
DETROIT, MICHIGAN 48226

*NOTE: No acknowledgment of receipt or return is required. The receiving library assumes responsibility for notification of non-receipt. Stamps in payment of transportation costs should accompany sheet D: Notice of Return.*

AUTHORIZED BY: (11) George Doe, Librarian

**REPORTS:** Checked by _____

SENT BY: ☐ BOOK RATE ☐ Express Collect

☐ _____ Insured for $_____
Other

Date sent _____ Charges $_____

DATE DUE _____
(or period of loan)

☐ For use in Library only

**NOT SENT BECAUSE:**

☐ Not owned by Library ← *Fold*

☐ Non-circulating ☐ Hold Placed

☐ In use ☐ Request again

☐ Other:

☐ Suggest you request of:

Estimated Cost of Microfilm _____

Photoprint _____

**RECORDS:** *(Borrowing library fills in)*

Date Vol. received: _____

Date Vol. returned: _____

By ☐ BOOK RATE ☐ Express Prepaid

Other: _____ Insured for $_____

**RENEWALS:** *(Request and report back on sheet C, Interim Report)*

Requested on: _____

Renewed to: _____
(or period of renewal)

1. Date request form is prepared.
2. Use for special instructions or circumstances, e.g. unavailability of item locally, last date which item would be needed.
3. Complete name and address of borrowing library <u>including zip code</u>. If more than one form is sent at one time, complete name and address must be included on each form.
4-6. Identification of borrower for whom request is made.
7. Name of author with first name or initials.
8. Title of book with edition, place and date of publication.
9. Complete bibliographic source of reference.
10. Complete address of Wayne State University, Medical Library.
11. Signature of librarian. <u>This is required</u>.

A. <u>PREPARE A SEPARATE FORM FOR EACH BOOK REQUESTED</u>.

B. <u>DETACH AND RETAIN BOTTOM COPY OF FORM ONLY</u>.

C. <u>ALL REQUESTS MUST BE TYPED</u>.